



U.S. General Services Administration

Federal Acquisition Service

Request for Quote (RFQ)

GSA Training Module for IWAC Region

RFQ Training Module Overview

Description: This training module will take you step-by-step through the Request for Quote (RFQ) document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component, specifically for the IWAC region, as well as the integrated RBA & e-Buy Solicitation Process.

Navigation: If the tutorial opens up in your web browser, simply click your mouse or your space bar to advance to the next slide. Use the “Backspace” key to go back. If the tutorial opens in the PowerPoint application, click on “F5” to view the tutorial. Use the spacebar or click your mouse to advance to the next slide. To go back, click on the “Backspace” key.

RFQ Glossary

Term	Definition
RFQ	Request For Quote - If RFQ is published in ITSS, then contractors will submit quotes in ITSS. If the RFQ is published in e-Buy then contractors will submit quotes in e-Buy.
RFI	Request For Information – Checking the ‘Sources Sought’ option on the BOMSOW/Order Mod for an RFQ being published in e-Buy delineates a RFI. Contractors will not be required to provide dollar amounts on their quote responses and a Market Analysis cannot be generated from the RFI once closed.
Sources Sought	If ‘Publish in e-Buy’ on a BOMSOW/Order Mod is set to Yes, this option determines whether users would like it to be an RFI (Sources Sought = Yes) or RFQ (Sources Sought = No).
Quote Due Date & Time	The date and time that the bidding process ends.
No Bid	Option for contractor to notify CSR they are not participating in specified RFQ.
Quote Summary for Unregistered Contractors	ITSS page that is generated after RFQ process is closed on an e-Buy published RFQ. Lists quote information submitted by contractors who weren’t registered in ITSS at the time the RFQ was closed.
Faxed Quote	Quote that CSR submits on contractor’s behalf after the RFQ has been closed.

ITSS RFQ Privileges

user Role Action	Create	Edit	View
GSA user	✓	✓*	✓
Client			✓
Contractor			✓**

*Limited edit privileges if RFQ in open state in e-Buy

**Contractors may only view pre-award if on BOMSOW Contractor List

WELCOME

ORDERS

FUNDING

REGISTRATION

CONTRACTS

Select a View:

<<-- View Orders -->>



<<-- View Inactive Orders -->>



<<-- View Action Items -->>



<<-- View Support Information -->>



Go to a Specific View Item:

[Create New Order](#)**Orders - Entire Package**

Next -> |

▼ Order Package

▼ REQUISITION005-COI Jamie Client (Test Organization) Award Notice Issued>>ROB

00 Chronology

▼ 01 BOM/SOW REQUISITION005 - 00 Amendment 00 AWARD NOTICE ISSUED

▼ RFQ Modification 00 Amendment 00 Revision 00 GSA APPROVED

Quote Amd 00 Rev 00 for Jim Contractor (TEST COMPANY CORP INC) Cnt# 263-97-D-0313, BID=\$883,500.00

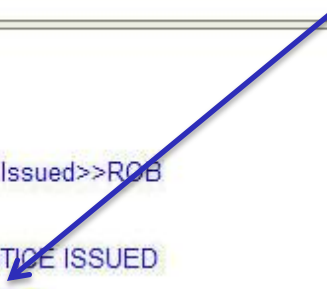
Quote Amd 00 Rev 00 for William Vendor (ACME CORPORATION) Cnt# GS-02F-0154R, BID=\$925,000.00

Quote Amd 00 Rev 00 for Patricia Partner (COMPANY ASSOCIATED) Cnt# GS-35F-0390K, BID=\$900,000.00

*Market Analysis Amendment 00 - Quote Selected: Jim Contractor - TEST COMPANY CORP INC (263-97-D-0313), \$927,675.00

>Notice of Award - Signed

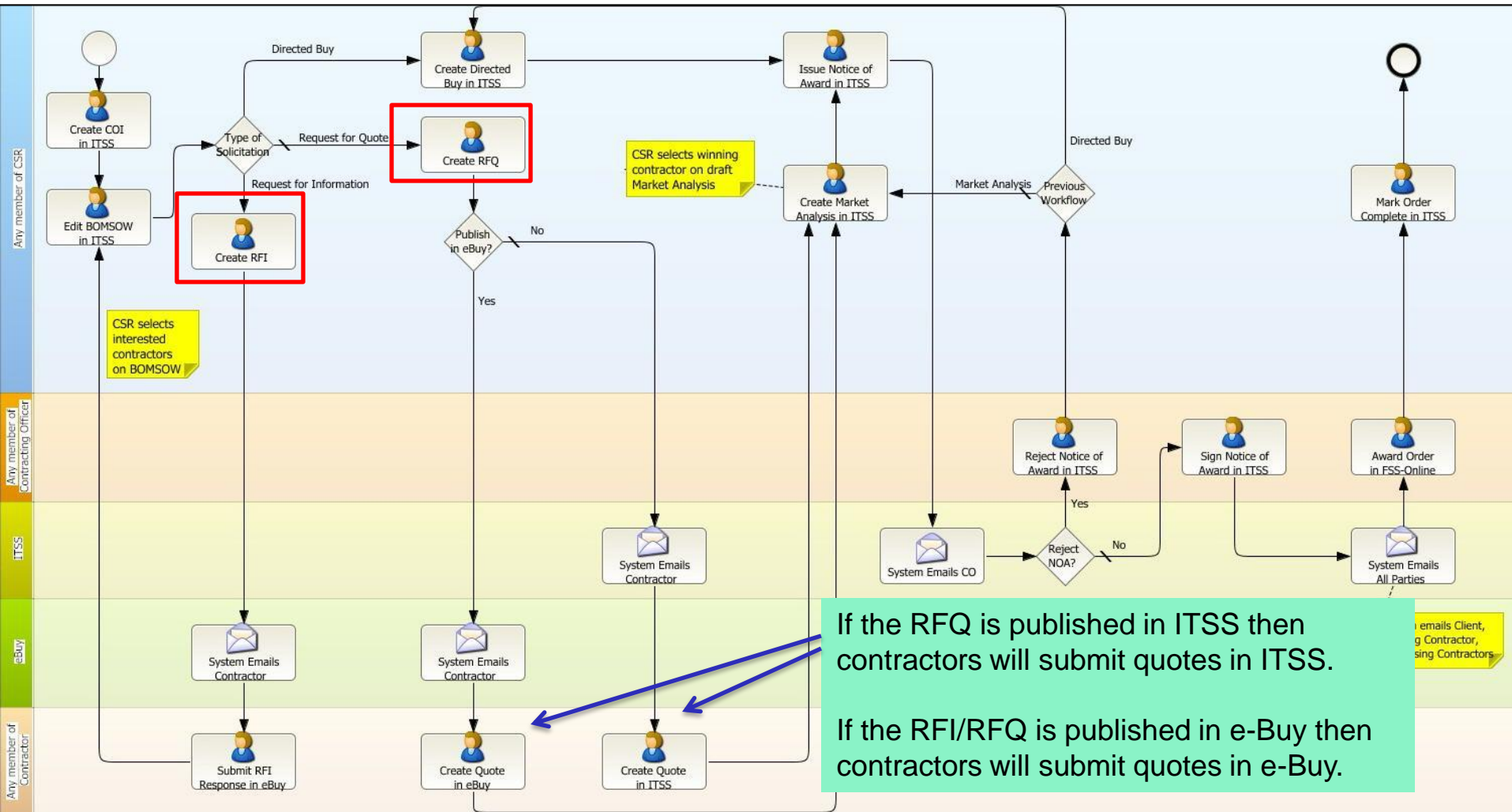
Click on the RFQ link in the Order Package view to open an existing RFQ in view mode



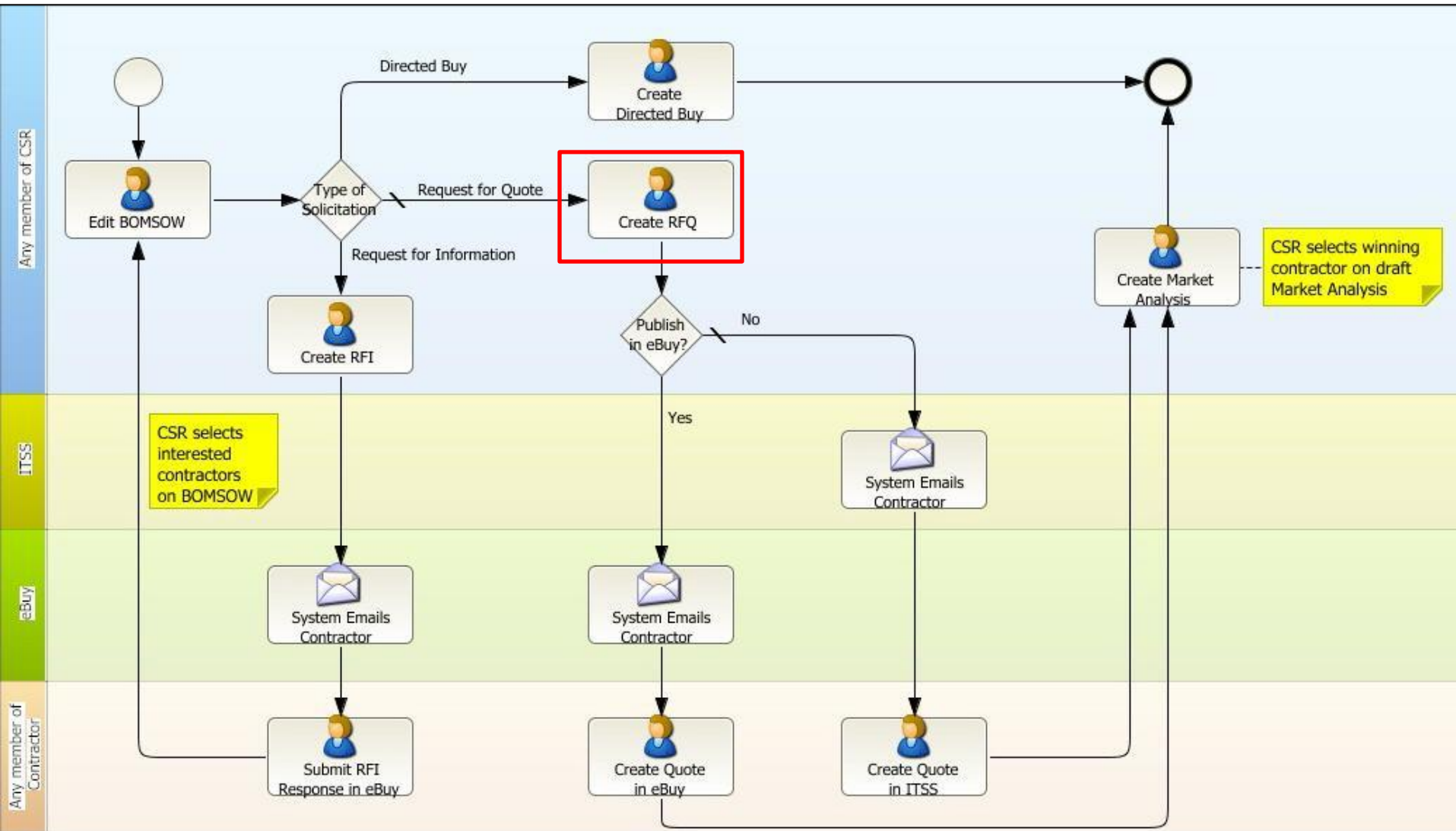
This is a U.S. General Services Administration Federal government computer system that is "For Official Use Only".

[Privacy Statement](#)

Within the Pre-Award Workflow Context



Within the Solicitation Workflow



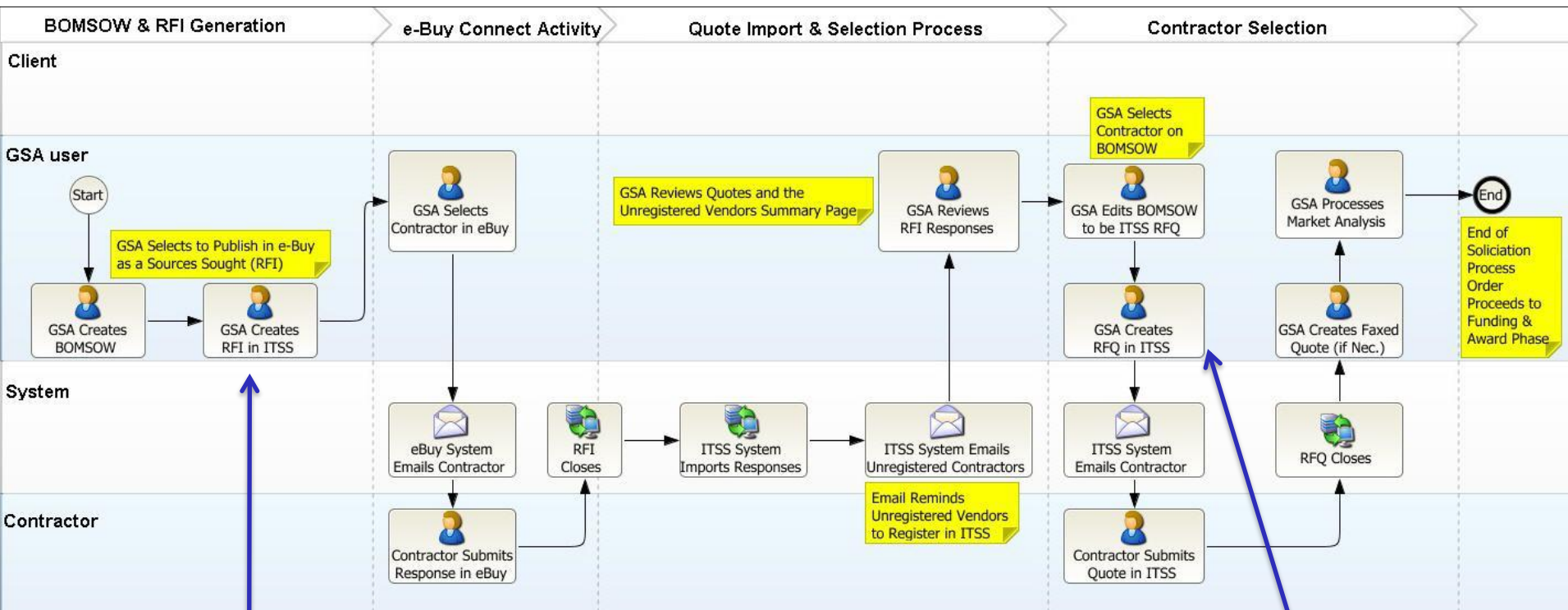
e-Buy Overview

- ITSS & e-Buy are integrated to allow:
 - GSA to publish ITSS RFQs & RFIs in e-Buy
 - Contractors to view & bid on opportunities from ITSS in e-Buy

- e-Buy provides compliance with Section 803 which requires DoD agencies to seek a broad range of competition. All e-Buy registered contractors can view/bid on *all* RFQs published in e-Buy.

- Web Services technology allows the RBA (and other external applications) to post RFQs to e-Buy and to import e-Buy quotes back into the application
 - This e-Buy feature is called ***e-Buy Connect***

RBA & e-Buy Solicitation Process



Create a Request for Information (RFI) in ITSS by setting Sources Sought = Yes on the BOMSOW

Create a Request for Quote (RFQ) in ITSS by setting Sources Sought = No on the BOMSOW

Publishing an RFQ in ITSS

If No is selected, then the RFQ will be published in ITSS

Publish in e-Buy:  Would you like to publish this opportunity as an RFQ in e-Buy?
☐ Yes ☒ No

If Yes, you will select contractors within e-Buy after you submit the RFQ in ITSS.

Contractor List:  <<----- List ----->>

Jim Contractor (TEST COMPANY CORP INC)
William Contractor (Acme Consulting INC)

[Pick From List](#) [Clear the List](#)

Highlighted entries will be saved. To highlight multiple entries, hold down the control key.

Contractor selection occurs on the BOMSOW via the Contractor pick list.

Desired contractors must be *selected* (highlighted in blue) in order to be issued the RFQ.

Create an RFQ by clicking the *Request Quote* button on the top of the *submitted* BOMSOW

GSA IT-Solutions Shop
You are signed in as CSR1 IWACAAS [IT-Solutions](#) [Guide Me](#) • [Site Help](#) • [Contact Us](#) • [Need Assistance](#) • [Log Out](#)

[WELCOME](#) [ORDERS](#) [FUNDING](#) [REGISTRATION](#) [CONTRACTS](#)

Bill of Materials / Statement of Work

Govt. Est	Directed Buy	Request Quote	Edit	Go To Order Package
---------------------------	------------------------------	-------------------------------	----------------------	-------------------------------------

WELCOME **ORDERS** FUNDING REGISTRATION CONTRACTS

Request for Quote

RFQ status

Close Without Saving

Submitted By: CSR1 IWACAAS at 10/11/2010
 Order ID: REQUISITION003 Mod 00, Amendment 00, Revision 00
 Client Rep: Jamie Client (Test Organization)
 Status: **Quotes Requested**
 Publish in e-Buy: No

Click the BOMSOW link to review requirements as well as all task item details

[Review the Bill of Material or Statement of Work](#)
[Review the Client Order](#)

 All Fields marked with  are required.


Project Descriptor: ROB

Task Items:

Type ⬆	Item No. ⬆	Description ⬆	POP From Date ⬆	POP To Date ⬆	Delivery Date ⬆
COM	0001	Workstations	n/a	n/a	12/01/2010
COM	0002	Desks	n/a	n/a	12/01/2010
COM	0003	Chairs	n/a	n/a	12/01/2010
COM	0004	Demountable Walls	n/a	n/a	12/01/2010
LAB	0005	Installation	12/01/2010	12/23/2010	n/a

All task items on the BOMSOW are displayed on the RFQ for contractor bidding

Comments:

Quote Due Date & Time:  **Date:** 01/15/2010 **Time:** 07 : 00 PM Eastern Standard Time

Client View of Quotes: ☒ Show All Quotes ☐ Show No Quotes ☐ Only Show Winner

GSA View of Quotes: ☒ All of Region ☐ Defined on Order

Primary Contractor List: [Jim Contractor, William Contractor, Patricia I. Partner, Victor Vendor]

Notify Cust Reps On Submitted Quote(s): ☒ Yes ☐ No

Point of Contact: George Gsa

Contact Phone: (210) 555-1234

Contact E-Mail: george.gsa@hotmail.com

[Edit History](#)

This is a U.S. General Services Administration Federal government computer system that is "For Official Use Only".
[Privacy Statement](#)

The RFQ close date and time

Restrict the client's view privileges to quotes to:

- View all quotes
- View no quotes
- View only the winning quote

Allow all GSA users in the region to view the quotes or only the users on the COI

If CSRs on the order want to be automatically emailed when a quote is submitted then click Yes to "Notify Cust Reps..." (does not apply for RFQs published in e-Buy).

Publishing an RFI/RFQ in e-Buy

If Yes is selected, then the RFQ will be created in ITSS and subsequently published in e-Buy via e-Buy Connect

Contractor selection occurs in e-Buy *after* creating the RFQ in ITSS

Create an RFI by selecting Yes

Publish in e-Buy: Would you like to publish this opportunity as an RFQ in e-Buy?
☒ Yes ☐ No

If Yes, you will select contractors within e-Buy after you submit the RFQ in ITSS.

Sources Sought: Post as a Sources Sought or Request for Information (RFI) notice?
☐ Yes ☒ No

Contractor List: <Contractor selection is not required in ITSS at this time>

Create an RFQ by clicking the *Request Quote* button on the top of the submitted BOMSOW

GSA IT-Solutions Shop
You are signed in as CSR1 IWACAAS [IT-Solutions](#) [Guide Me](#) • [Site Help](#) • [Contact Us](#) • [Need Assistance](#) • [Log Out](#)

WELCOME **ORDERS** **FUNDING** **REGISTRATION** **CONTRACTS**

Bill of Materials / Statement of Work

[Govt. Est](#) [Directed Buy](#) [Request Quote](#) [Edit](#) [Go To Order Package](#)



IT-Solutions Shop

You are signed in as George Gsa

IT-Solutions

[Guide Me](#) • [Site Help](#) • [Contact Us](#) • [Need Assistance](#) • [Log Out](#)

WELCOME

ORDERS

FUNDING

REGISTRATION

CONTRACTS

Request for Quote

Close Without Saving

Submitted By: George Gsa at 01/06/2010
 Order ID: TRAINING002, Mod 00, Amendment 00, Revision 00
 Client Rep: Jamie Client (Test Organization)
 Status: **Quotes Requested - RFQ Published in e-Buy**
 Publish in e-Buy: Yes
 Sources Sought: No

The BOMSOW is non-editable while the BOMSOW status is "Quotes Requested – RFQ Published in e-Buy"

If Sources Sought is No then the solicitation has been issued as an RFQ.

If Sources Sought is Yes then the solicitation has been issued as an RFI.

[Review the Bill of Material or Statement of Work](#)
[Review the Client Order](#)

All Fields marked with are required.

Project Descriptor: Project Descriptor

Task Items:

Type	Item No.	Description	POP From Date	POP To Date	Delivery Date
COM	0001	Workstations	n/a	n/a	12/01/2010
COM	0002	Desks	n/a	n/a	12/01/2010
COM	0003	Chairs	n/a	n/a	12/01/2010
COM	0004	Demountable Walls	n/a	n/a	12/01/2010
LAB	0005	Installation	12/01/2010	12/23/2010	n/a

Task Items on the RFQ will be sent to e-Buy as line items

Comments:

RFIs/RFQs published in e-Buy can only close on the hour

Quote Due Date & Time:

Date: 03/03/2010

Time: 07 : 00 PM Eastern Standard Time

Pick Quote Due Date wisely: RFIs/RFQs published in e-Buy cannot close early; they can only be extended

Note: If publishing in e-Buy, minimum solicitation open time is 49 hours.

Client View of Quotes:

☒ Show All Quotes ☐ Show No Quotes ☐ Only Show Winner

GSA View of Quotes:

☒ All of Region ☐ Defined on Order

Primary Contractor List:

<You will be prompted to select contractors in e-Buy upon submission of this form>

Notify Cust Reps On Submitted Quote(s):

No

Setting not available for RFIs/RFQs published in e-Buy. CSRs will not be notified when contractors submit quotes in e-Buy.

Point of Contact:

George Gsa

Contact Phone:

(858) 555-1234

Contact E-Mail:

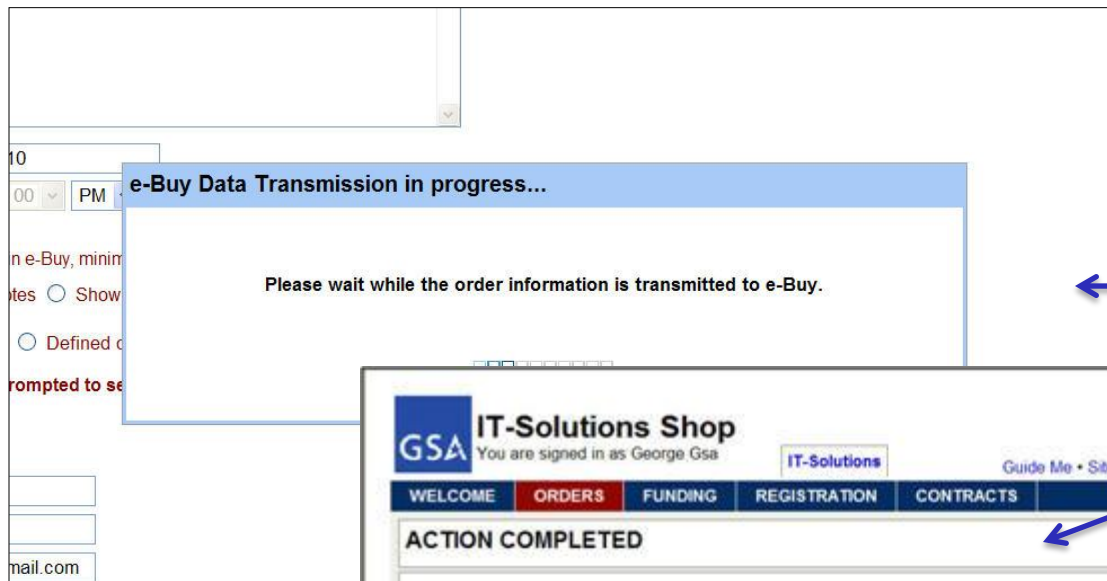
george.gsa@hotmail.com

[Edit History](#)

Submit

Close Without Saving

This is a U.S. General Services Administration Federal government computer system that is "For Official Use Only".
[Privacy Statement](#)



1. A popup will notify the user that data is being transmitted to e-Buy
2. ITSS will display a confirmation page
3. e-Buy Connect will open in a new browser window where GSA user completes the RFQ submission

The screenshot shows the e-Buy Connect interface. It includes a header with "GSA IT-Solutions Shop" and "You are signed in as George Gsa". A navigation bar contains links like WELCOME, ORDERS, FUNDING, REGISTRATION, and CONTRACTS. A message below the navigation bar says "ACTION COMPLETED". Below this, there is a message: "The Selected RFQ on Order# TRAINING002-00 has been submitted successfully in ITSS. Please proceed to e-Buy Connect to view the Solicitation/RFQ page. A new browser window will open momentarily." Below this, there are links for "Return to RFQ | Order Package | Welcome Page" and a prompt to "Select an option above to return to IT-Solutions".

The e-Buy Connect interface shows the following information:

- Step 2: RFQ Information**
- Instructions:** Please review your RFQ information below.
- Reminder:** In order to satisfy FAR requirements, you should request quotes from at least three (3) vendors for orders exceeding the micro-purchase threshold (FAR 8.405-1). Include brand name justification/ documentation if applicable (FAR 8.405-6).
- Categories Selected:** 5 Add Category
- RFQ ID:** RFQ233640
- Reference #:** TRAINING002_14824
- RFQ Title:** Project Descriptor
- RFQ Close Date:** 02/28/2010 07:00:00 PM EST
- Delivery Period of Performance:** 03/01/2010 through 03/31/2015
- Use Items:**

Qty	Unit	Ship Address
1	EA	(1)
1	EA	(1)
1	EA	(1)
1	EA	(1)
1	EA	(1)
1	EA	(1)
1	EA	(1)
1	EA	(1)
1	EA	(1)
- Description:** Order Summary
- Order Summary:** To submit a quote for this RFQ, you must be registered in the Regional Business Application (RBA). (Please Note: Registration must be completed using the same Username (first/last name), Vendor Company, Duns Number, and Contract Number referenced in the Quote submittal). Additionally, please submit your quote using only the line items on the RFQ. Any additional line items added to your quote will be ignored and will not be considered or displayed in the RBA.
- Attached Documents:**
- Shipping Address:** (1) Address: The LEGISLATIVE BRANCH, 1245 Schenck Ave, Suite C, San Diego, CA 92128, United States
- Individual Receiving Shipping:** Shipping Person: (866) 555-1234, shipping-person@hotmail.com
- Submit RFQ**

Step 2. RFQ Information

Instructions: Please review your RFQ information below.

Reminder: In order to satisfy FAR requirements, purchase threshold (FAR 8.405-1). Include brand

Categories Selected:

► Add Category

RFQ ID
RFQ233640

RFQ Title
Project Descriptor

RFQ Close Date
02/28/2010 07:00:00 PM EST

Delivery
Period of Performance 03/01/2010 through 03/31/2015

Line Items

Mfr. part No/NSN/Item	Manufacturer	Product/Service Name	Qty	Unit	Ship Address
Task Item Type: COM; Task Item Number: 0001	Delivery Date:12/01/2010	Workstations	1	EA	(1)
Task Item Type: COM; Task Item Number: 0002	Delivery Date:12/01/2010	Desks	1	EA	(1)
Task Item Type: COM; Task Item Number: 0003	Delivery Date:12/01/2010	Chairs	1	EA	(1)
Task Item Type: COM; Task Item Number: 0004	Delivery Date:12/01/2010	Demountable Walls	1	EA	(1)
Task Item Type: COM; Task Item Number: 0005	POP From:12/01/2010-POP To:12/23/2010	Installation	1	EA	(1)

Description

Order Summary

To submit a quote for this RFQ, you must be registered in the Regional Business Application (RBA). (Please Note: Registration must be completed using the same Username (first/last name), Vendor Company, Duns Number, and Contract Number referenced in the Quote submittal). Additionally, please submit your quote using only the line items on the RFQ. Any additional line items added to your quote will be ignored and will not be considered or displayed in the RBA.

Attached Documents:

Shipping Address

(1) Address1:
THE LEGISLATIVE BRANCH
1245 Schematic Ave
Suite C
San Diego, CA 92126
United States

Individual Receiving Shipment
Shipping Person
(858) 555-1234
shipping.person@hotmail.com

► Submit RFQ

Task items *cannot* be edited on the BOMSOW in ITSS if the open RFQ is published in e-Buy.

RFIs/RFQs display task item data as line items in e-Buy.

The e-Buy *Line Items* table headers reflect e-buy line item information (Mfr. Part No/ NSN/ Item, Manufacturer, Product/Service Name, etc). When ITSS exports task item data, e-Buy imports the task item data and fits it into the table. Therefore, the e-Buy line item table headers do not necessarily reflect the ITSS task item data displayed.

Add contractors by
clicking *Add Category*

Step 2. RFQ Information

Instructions: Please review your RFQ information below.

Reminder: In order to satisfy FAR requirements, you should request quotes from at least three (3) vendors for orders exceeding the micro-purchase threshold (FAR 8.405-1). Include brand name justification/ documentation if applicable (FAR 8.405-6).

Categories Selected:

Vendors
selected Remove
Category

► Add Category

RFQ ID
RFQ233640

Reference #
TRAINING002__14824

RFQ Title
Project Descriptor

RFQ Close Date
02/28/2010 07:00:00 PM EST

Delivery
Period of Performance 03/01/2010 through 03/31/2015

Line Items

Mfr. part No/NSN/Item	Manufacturer	Product/Service Name	Qty	Unit	Ship Address
Task Item Type: COM; Task Item Number: 0001	Delivery Date:12/01/2010	Workstations	1	EA	(1)
Task Item Type: COM; Task Item Number: 0002	Delivery Date:12/01/2010	Desks	1	EA	(1)
Task Item Type: COM; Task Item Number: 0003	Delivery Date:12/01/2010	Chairs	1	EA	(1)
Task Item Type: COM; Task Item Number: 0004	Delivery Date:12/01/2010	Demountable Walls	1	EA	(1)
Task Item Type: COM; Task Item Number: 0005	POP From:12/01/2010-POP To:12/23/2010	Installation	1	EA	(1)

Description

Order Summary

To submit a quote for this RFQ, you must be registered in the Regional Business Application (RBA). (Please Note: If you are submitting a quote, you must be registered in the RBA and have completed using the same Username (first/last name), Vendor Company, Duns Number, and Contract Number (if applicable). Additionally, please submit your quote using only the line items on the RFQ. Any additional line items will be ignored and will not be considered or displayed in the RBA.)

Attached Documents:

Shipping Address

(1) Address1:
THE LEGISLATIVE BRANCH
1245 Schematic Ave
Suite C
San Diego, CA 92126
United States

Individual Receiving Shipment
Shipping Person
(858) 555-1234
shipping.person@hotmail.com

After adding contractors to the RFQ click *Submit RFQ*. Based on e-Buy data validations GSA user may be prompted to submit RFQ again.

► Submit RFQ

R *FQ Summary*Selected **vendor(s)** were notified

RFQ Summary Page only loads when RFQ has been *fully* submitted. Email notifications have now been sent to the selected contractors by e-Buy Connect.

RFQ ID
RFQ233640Reference #
TRAINING002__14824**RFQ Title**
Project Descriptor**RFQ Status**
Open**Delivery Days**
Period of Performance 03/01/2010 through 03/31/2010**RFQ Issue Date**
02/24/2010 11:01:41 AM EST**RFQ Close Date**
02/28/2010 07:00:00 PM EST

Click *Close Connect Session* link to close the browser window

Line Items

Mfr. part No/NSN/Item	Manufacturer	Product/Service Name	Qty	Unit	Ship Address
Task Item Type: COM; Task Item Number: 0001	Delivery Date:12/01/2010	Workstations	1	EA	1
Task Item Type: COM; Task Item Number: 0002	Delivery Date:12/01/2010	Desks	1	EA	1
Task Item Type: COM; Task Item Number: 0003	Delivery Date:12/01/2010	Chairs	1	EA	1
Task Item Type: COM; Task Item Number: 0004	Delivery Date:12/01/2010	Demountable Walls	1	EA	1
Task Item Type: COM; Task Item Number: 0005	POP From:12/01/2010-POP To:12/23/2010	Installation	1	EA	1

Description**Order Summary**

To submit a quote for this RFQ, you must be registered in the Regional Business Application (RBA). (Please Note: Registration must be completed using the same Username (first/last name), Vendor Company, Duns Number, and Contract Number referenced in the Quote submittal). Additionally, please submit your quote using only the line items on the RFQ. Any additional line items added to your quote will be ignored and will not be considered or displayed in the RBA.

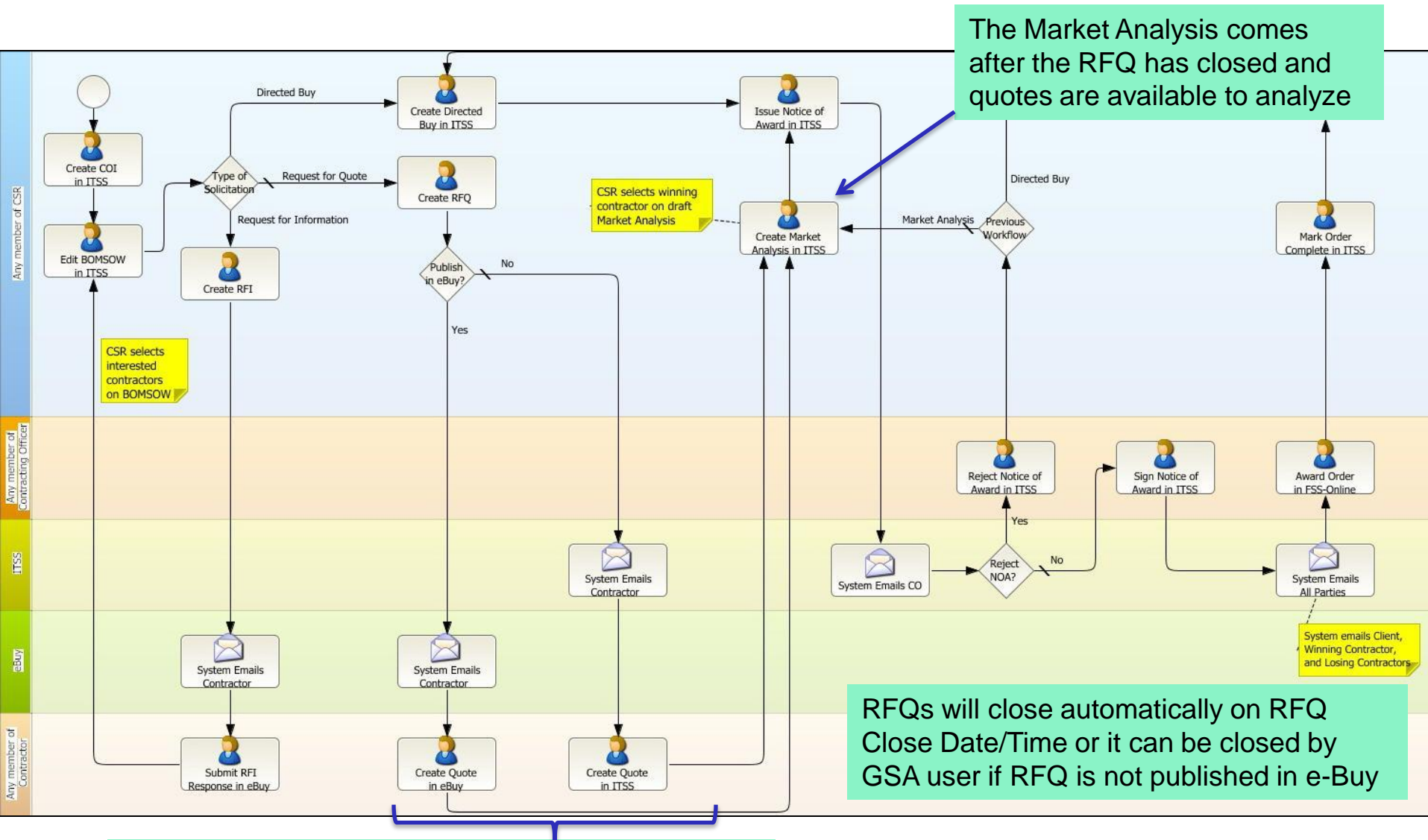
Attached Documents:**Shipping Address**

(1) Address1:
THE LEGISLATIVE BRANCH
1245 Schematic Ave
Suite C
San Diego, CA 92126
United States

Individual Receiving Shipment
Shipping Person
(858) 555-1234
shipping.person@hotmail.com

Default message to contractors that they must be registered in RBA

Closing the RFQ and Next Steps



Contractors are only able to submit and edit quotes in ITSS if the RFQ status is Quotes Requested

RFQ Status Glossary

Status	Definition
Quotes Requested	RFQ close date is later than current date.
Quotes Requested - RFQ Published in e-Buy	Publish in e-Buy option on BOMSOW has been set to 'Yes' and RFQ close date is later than current date.
Closed	RFQ close date is earlier than current date. GSA user can create a Faxed Quote or Market Analysis.
GSA Recommended	If Client Approval required on Market Analysis, Quote has been selected by GSA.
GSA Approved	Market Analysis has been submitted and no Client or Approving official is required.
GSA Rejected	Market Analysis has been rejected by selecting "No Contractor Selected." RFQ cannot be edited, reopened, or have another Market Analysis created from it.
Approving Official Approved	If GSA Approving Official required, GSA Approving Official has approved Market Analysis.
Approving Official Rejected	If GSA Approving Official required, GSA Approving Official has rejected Market Analysis.
Client Approved	If Client Approval required, Client has approved Market Analysis.
Client Rejected	If Client Approval required, Client has rejected Market Analysis.

Federal Acquisition Service

Questions & Support

- For questions regarding IWAC Policy please contact stephen.gervasi@gsa.gov
- For questions regarding the RBA RFQ training module please contact RBA Technical Support:
 - Phone: (877) 243-2889
 - Email: helpdesk@gsarba.com

